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SUPERMARKET BUSINESS

In This Issue
PUBLICATIONS SUPPLEMENT
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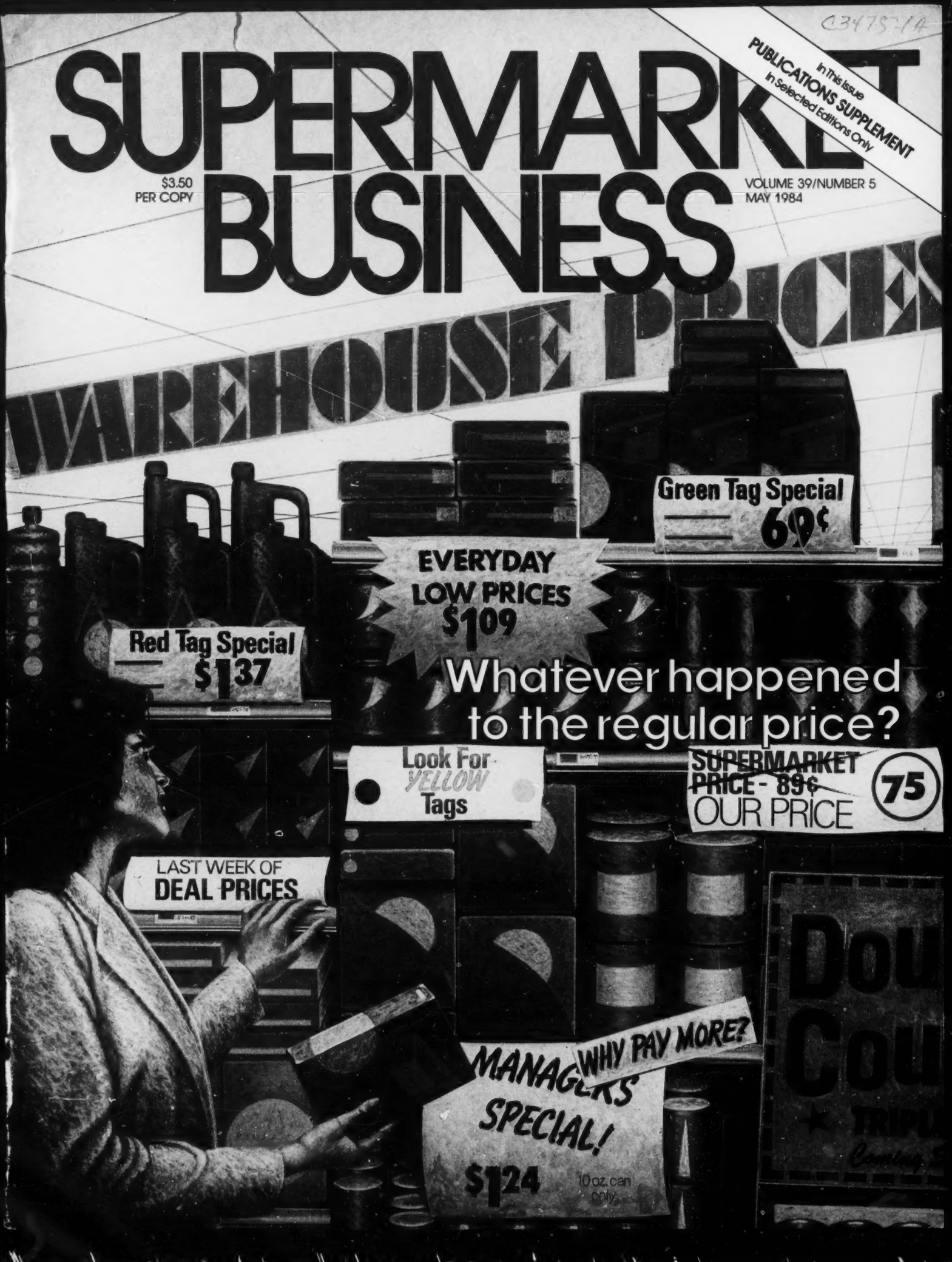
$3.50
PER COPY

VOLUME 39/NUMBER 5
MAY 1984



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SUPERMARKET BUSINESS Magazine (ISSN 0196-5700) is published monthly by Fieldmark Media, Inc., 25 W. 43rd St., New York, N.Y. 10036. Telephone: (212) 354-5169. Circulated free of charge to grocery retailers and wholesalers. U.S. subscriptions $32 per year; Canada, $37 per year. Foreign subscriptions $48. Single copies $3.50 except Consumer Expenditures Study (September issue) $15 per copy. (Discount prices available on multiple purchases.) Copyright © 1984 Fieldmark Media, Inc. All rights reserved. Second class postage paid at New York, N.Y., and additional mailing offices.

BPA ABP American Business Press Inc

SUPERMARKET BUSINESS

VOLUME 39
NUMBER 5
MAY 1984

PAGE 25

WHATEVER HAPPENED TO THE REGULAR PRICE?
Today's new store formats definitely benefit the consumer—in terms of price, variety and quality. But what about all of the new promotional deals on the market? The consumer, faced with all sorts of specials, couponing extras and heavy markdowns, may become increasingly confused about price/value relationships and brand loyalty. In the long run, the consumer can become disenchanted about store loyalty and even the supermarket itself. In this "position paper," SB looks at the conditions that have gotten us where we are today, and the pros and cons of doing—or not doing—what comes naturally to marketer and merchandiser alike.

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MOTT'S SHOPRITE'S MASSIVE NEW FOOD STORE
Mott's is used to big stores and big volumes. But 50,000 square feet devoted almost entirely to food and groceries indicates a shift in positioning to the market—and how far grocery retailing has come.

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UNCORKING THE WINE MARKET
Wine is becoming more and more popular among American consumers, as they look for alternatives to heavier alcoholic drinks. Wine can be an important—and growing—category for the retailer who knows how to merchandise the product to a specific consumer population.

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GROWING, GROWING, GROWN: WISCONSIN STORE IS NOW STATE'S LARGEST
The Tri City Pick 'N Save is not only Wisconsin's largest, it's among the state's most aggressive stores. Despite its enormous size, it's easy to shop and is geared to the "dual-career" family.

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RESEARCH STUDY: VIDEOCASSETTE RECORDERS AS TRAINING DEVICES IN THE GROCERY INDUSTRY
This study, written by three retailers as part of the Food Industry Marketing program at USC, examines, through interviews and polls, this important new training tool.

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JERRY'S MAKES WAVES ON SANIBEL ISLAND
Jerry's isn't the kind of store you'd expect to find on a vacation island—Sanibel Island, Fla., to be exact. Nor is it likely to be found anywhere else. Here, with elegance, savoir-faire and style, Jerry Paulsen has created a singular, single-stop shopping experience.

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NONFOODS BUSINESS: MERCHANDISING FOR THE GREAT OUTDOORS
Two store chains demonstrate how the selling of outdoor merchandise can be a profitable, year-round department, no matter what kind of space the store has.

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HUMPTY DUMPING ITS OLD IMAGE
Allied Supermarkets has had many rough financial years in the past and of late. Partly as a result, its Humpty supermarkets in Oklahoma, and elsewhere, had come to look a little shopworn. Now, Allied has undertaken a market rebuilding program to try to put the pieces back together again for Humpty.

PAGE 102

EVER UPWARD WITH GM
Space is at a premium in Manhattan, and no more so than for a supermarket. D'Agostino's has tackled some of its space problems for its ambitious GM program by going upward, and using every available bit of space—in the air or on the walls—to merchandise its products.

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ALSO IN THIS ISSUE:
SPECIAL ADVERTISING SUPPLEMENT* PUBLICATIONS—WORTH MORE THAN COVER PRICE

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TRADESCAN

The Setpoint Diet kit includes a tear-out pocket guide and a menu planner.

General Food Designs Diet

WHITE PLAINS, N.Y.—With fully one in four Americans overweight and 50 percent of the population self-proclaimed "frequent dieters," the number of diet books and programs has reached what would seem to be near-explosion point in recent years.

Now, add to the long lists of weight loss literature General Foods' Setpoint Diet kit, designed for adults who wish to lose weight and keep it off, and who don't have any special dietary needs.

Central to the diet are the concepts of portion control and adequate, moderate exercise. Dr. Gilbert Leveille, who headed the team of General Foods scientists that developed the diet, explains that the Setpoint Diet is inexpensive and easy-to-follow, because no special foods are required and a menu planner is included in the kit.

The menu planner offers two weeks' worth of menus and recipes developed by General Foods Consumer Center. Many of the meals include specific General Foods' brand products, such as Tang, Post cereals, Maxwell House, Louis Rich turkey and Entenmann's baked goods.

The company is offering the Setpoint Diet program to consumers for a nominal $2.75, which covers production and handling charges. Starting this month, General Foods will run a year-long publicity campaign, kicking off with full-page ads in the top 14 consumer magazines. In addition, the diet kit will be available through professional health groups.

According to Philip L. Smith, General Foods president, the diet is just the latest of many consumer nutrition information activities it has sponsored since the formation of its Consumer Center in 1925. ■

Pork Subject Of Seminar

DES MOINES, Iowa—Food editors from some of the nation's leading consumer magazines, including *Redbook*, *Woman's Day* and *Good Housekeeping*, as well as syndicated and other newspaper food writers have accepted invitations to a four-day pork-related seminar this month—following which consumer demand for pork products could get a real push up.

Sponsored by the National Pork Producers Council, the seminar takes place here May 15-18. Among the topics to be covered are pork and today's nutrition, health and fitness trends, buying trends, microwave cookery and the latest on reduced sodium and curing processes, vacuum packaging and restructured meats. ■

Is Scanning Installation Rate Slowing?

WASHINGTON—By the end of February, this year, a total of 9,278 American supermarkets had checkout scanners in place, according to figures compiled and checked by the FMI. Of that total, 243 had been installed since the end of 1983, when 8,995 stores had them. Annualized, that represents a scanning store growth rate of *only* 18.8 percent.

Compared to the growth rates of several recent years (see chart), that's a big slowdown. And there may be a good reason that's so, according to a spokesperson for one of the leading scanner vendors: "Most installations so far have been in larger stores and chains, and a greater share of future growth will come from smaller stores and independents," he says, noting that "they don't put in anywhere near the numbers of scanners the chains do."

That source cautions, though, against reading too much into an annualized two-month installation figure. "Historically," he notes, "there's been more installation activity during the summer and in the pre-holiday period than in the early—and late—months of the year." But, he adds, "a person may be onto something in thinking that the growth rate this year is likely to be significantly lower than what we've seen of late."

Market shares among the top five suppliers of scanners "have jumped around" over the years since scanning's early years, but the players have remained the same. Their market shares last year were: NCR—37.5 percent; Datachecker—26.8; IBM—21.7; Data Terminal—6.5; and Sweda—6.2. Last year also saw a newcomer among scanning suppliers—Tec America—capture 0.6 percent of the total market. ■

Scanning Supermarkets —Year-End Figures—

Year	Number of Stores
1974	6
1975	30
1976	97
1977	176
1978	444
1979	1182
1980	2483
1981	3984
1982	5902
1983	8995

Source: Food Marketing Institute

System Shows Same Price on Shelf, Scanner

DALLAS—A "tiny" (four to six worker) Texas company recently launched a real Texas-sized (i.e. big) innovation in shelf price-changing.

The company is Dallas's Viscom Corp. Its product, now in use only in Minyard Foods' Sack 'n Save store in Irving, Tex., electronically displays prices (and other information) on shelf strips that are electronically tied to the store's scanners. As prices are changed in the latter's memory, they're also changed on-shelf. The system's developer, Viscom president Robert Woolfolk, believes it's unique—at least in this country.

In the Minyard application, the system is being tested in the frozen foods and produce sections, between which it covers "around 1,000 prices," Woolfolk says. Each presently passes through a cable to a shelf-end module then through further cables concealed behind the shelves. In this instance, the shelves were retrofitted with the cables (that is, they were installed after the shelves were in place in the store).

Two, or three, alternatives to that type installation also are being thought about, says Woolfolk. First, once the chip-based system is being volume-produced, it would be practical to prewire the shelves. Or, more simply, they could be equipped with FM radio receivers which could be fed the prices (at the same time the scanners get them) from an instore broadcasting device. Simplest yet, though, would be the use of infra-red radio waves to transmit the prices. Such a system now is being "seriously considered" by Viscom's engineers.

An installation of this system is expected to cost "around $100,000 for an average-sized supermarket," Woolfolk says. By comparison, "in a convenience store-sized application," he adds, "it might only cost around $5,000." ■

Produce Course Grows Like Mad

ITHACA, N.Y.—Cornell University's Food Industry Management Home Study Program has, during its 20 years of existence, seen some of its programs attract a lot of attention from ambitious supermarketers. Few, though, have caught on so fast as has the course entitled Produce Management and Operations, which was introduced several months ago.

Co-sponsored by Cornell and the United Fresh Fruit and Vegetable Association (UFFVA), this course by last month had attracted more than 600 enrollees, says Cornell program director George (Bud) Hayward. "It's certainly the most popular of all the (24) programs we're offering now," he says, "and it's among the most popular we've ever offered." The very most popular, he adds, has been a course on personnel training.

Hayward notes that, while individual enrollees still outnumber group participants, there is increasing interest on the part of food retailing companies to sign up several or more employees. A number of "medium to large companies" (including Syracuse, N.Y.'s P & C Food Markets, Loblaws of Toronto and Cincinnati-based Kroger) have gone the group-workshop route with the produce program.

There presently are around 14,000 people actively enrolled in these Cornell home study courses. More than 140,000 have participated in the program since its inception. ■

'Specialty' Show Due

WASHINGTON—For the increasing number of supermarketers who are "trading up," as industry consultant Leonard Schechter calls it, to gain or hold a strong position in a competitive marketplace, much of interest is likely to be found at next month's 30th International Fancy Food & Confection Show in Washington, D.C.

The show is scheduled for the capital city's Convention Center June 24-27, and will feature some seminar-type sessions as applicable for supermarket specialty and deli department managers. Further information on the show is available from Joyce Lorinstein, (212) 505-1770. Outside New York State: (800) 255-2502. ■

RESEARCH STUDY:

VIDEOCASSETTE RECORDERS

As Training Devices in the Grocery Industry

This article was written by Mel Bomprezzi, Kroger Co.; Mike Halpin, Kroger Co., and Jack Shandly, Ralphs, as a research paper that was part of a Food Industry Marketing Program at USC. The writers have received a plaque at the annual Food Industry Marketing dinner at the end of April for their work.

Grocery chains in Southern California have realized the benefits of in-store video training as the marketplace expands geographically away from corporate training centers. In the grocery industry today, technological change is rapidly replacing many aspects of the industry. Presently, companies are looking toward in-store video training to provide consistent, timely, and up-to-date training for all employees throughout the chains.

The report is based on a survey of 300 store employees and personal interviews with corporate training personnel and store managers of four chains in the Southern California marketing area. The response rate to the questionnaire was 27 percent.

The findings of our study reveal that video equipment as a training medium is effective, if it is properly emphasized by store management. Without such emphasis at store level, we have found that video training is difficult, if not impossible, to implement in the stores successfully.

The study has shown that the future use of video training equipment in the grocery industry has the potential to revolutionize many aspects of training and communication.

In today's changing world, employee training programs serve an increasingly important part in the overall success of a business. In looking to the grocery industry, employee training programs help as advanced technology continues to affect the industry.

The primary goal of this study is to determine the effectiveness of video equipment as an instore training aid. This will be accomplished by measuring the training personnel's perceptions of video equipment use with the actual effectiveness at store level.

METHODOLOGY

Three methods were used to collect primary data:

(1) Personal Interviews

Personal interviews were conducted by the research team. These interviews focused on training personnel and store managers of four major food retailers in Southern California. The five store managers were selected at random from each chain to help achieve an unbiased response. We felt that if training personnel selected the store managers, we would get the company view and not the manager's personal view. The training personnel were interviewed to establish exactly:

a. Why their company made the commitment to video tapes.
b. Why they chose the style of implementation used at store level.
c. If, in their opinion, the program has been a success.
d. What they view to be the future of video training equipment.

(2) Direct Mail Survey

This survey was conducted at Vons Grocery Company. It consisted of a cover letter, the questionnaire, and a postage-paid self-addressed envelope. One hundred employees were selected by Von's training director to participate in our research. We chose this style as an alternative to the in-store survey.

(3) In-Store Survey

This survey consisted of a cover letter, a questionnaire, a plain envelope to insure anonymity and a mail bag located next to the employee time clock.

The research team selected this method assuming the employees would complete the questionnaire at the end of their shift, thus, increasing our response. Two hundred employees were selected from Ralphs Grocery Company and Safeway of Southern California.

How Video Training Equipment is Used in Various Industries Today

Presently, video training equipment is expanding rapidly in all aspects of industry. For example, Carrier Air Conditioning Company has recently transferred to using videos as a primary on-the-job training medium for their distributors. Louis Patalita, Carrier's manager of service operations, stated: "Video equipment has provided a channel for reaching many more dealers, service and sales representatives faster, and it has made the training concept an integral part of a dealer's daily operation."[1] The article went on to stress that much of Carrier's success with videos was the result of transmitting information that is vital to job performance. For example, showing technicians how to service new machines, briefing salesmen as to the important selling points of new machines and providing distributors with updates and machine improvements. All video tapes are geared toward service and point of sale improvement.

In the transportation industry, video tapes are used as a means to update transit-bus drivers in an effort to reduce residential and industrial accidents. The video tapes are made and supplied by the Hartford Insurance Group on a nationwide basis. Myron Stacks, Hartford's Assistant Director of Transportation Services Loss Control, stresses: "The films fill a void in a transit bus training that has existed for years."[2]

Illinois Bell Telephone Company has been using audio-visuals as a training aid for over 30 years. Mr. Allen, Creativity Manager for the company's audio visual training department, says: "When any new section has the need for educating their people about how to do something, we are included early on in the discussions and we put together programs to help in the general training process."[3] Despite the fact that he cannot estimate costs exactly, Mr. Allen is quite satisfied that video training works and pays off. Illinois Bell measures its video training program by way of service polling—actually calling customers and asking their opinion of the service level they receive and possible improvements. As a result, the employees have a positive incentive to view and review the training videos.

In looking at the diversity of the three industries, it is evident that each has a common bond. In each industry tremendous emphasis is put on using videos from the corporate level all the way down to the actual viewers. In every case the training medium is supplemented with some form of positive reinforcement.

FINDINGS: Effectiveness of In-Store Videos as a Training Medium in the Grocery Industry

The use of video training tapes for training and other communication purposes in the grocery industry has been growing since 1978, when Loblaws, Ltd., Toronto, became one of the first to use the training medium.[4] Presently, industry sources estimate that 30 percent of chains use video tapes for training, with that amount expected to increase to more than 50 percent by 1985.[5] In looking ahead, most chains in the industry using video training equipment hope to accumulate a library for employee usage. The average cost of equipping each store with a monitor and a playback

1 "Lending Library Concept," *Air Conditioning, Heating & Refrigeration News*, August 24, 1981, p. 153.

2 "Reinforcing Your Training Programs," *Training & Development Journal*, Vol. 35, No. 1, January 1981, pp. 42-44.

3 *Ibid.*, pp. 43 and 44.

4 *Supermarket Business*, Fieldmark Media, Inc., New York, New York, Volume 38, No. 10, October 1983.

5 *Ibid.*, p. 52.

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VIDEOCASSETTES

machine is approximately $1,000. The following is a summary of some of the advantages video cassettes have over other training mediums as reported from a series in *Supermarket News*, based on interviews with corporate officials.

(1) Video tapes are easy to handle and do not require a high level of expertise.

(2) Video tapes provide a higher degree of uniformity in training.

(3) On a "one-to-one" basis, an employee can study at his/her own pace.

(4) Supermarket companies can make video tapes "in-house" and get instant feedback as to their quality and

TABLE 1

Employees' Years with Company

Years with Company	Percent of Respondents	Department Breakdown: Cashiers	Clerks
1-2 Years	14.3%	64%	36%
3-6 Years	54.5	59	41
7-10 Years	23.4	45	55
11-14 Years	6.5	38	62
Over 14 Years	1.3	26	74

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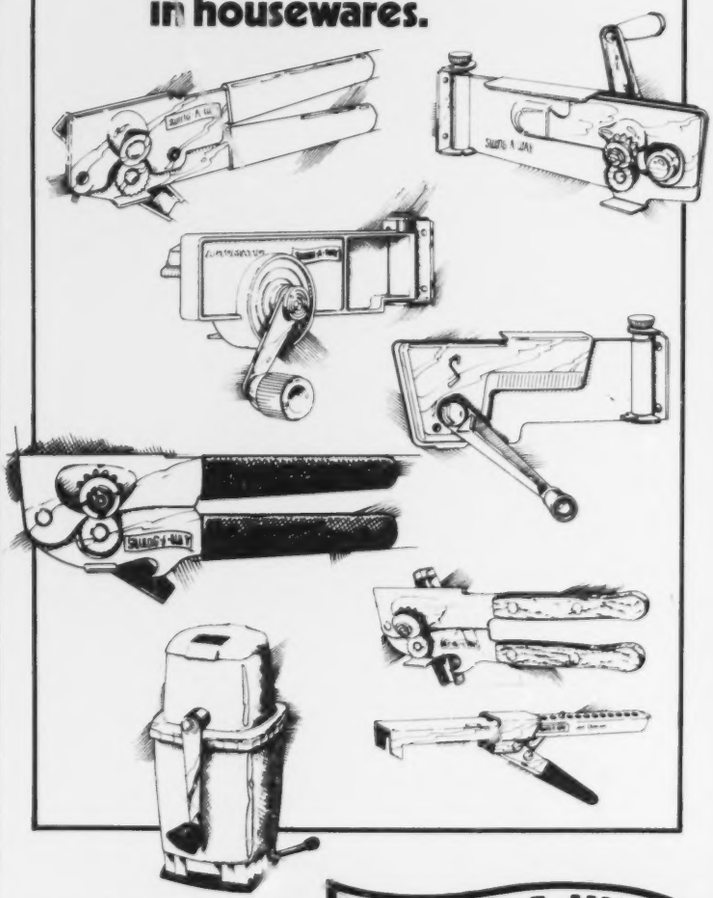

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VIDEOCASSETTES FOR TRAINING PROGRAMS

effectiveness.

(5) Video tapes provide standardization in training throughout the company.

Background Data

Our primary research was confined to the Southern California market, specifically, the top four chains in the market: Vons Grocery Company, Ralphs Grocery Company, Alpha Beta Grocery Company, and the Safeway Company.

Respondent Demographics

Table 1 reports that the majority of employees responding to the survey had three to six years' experience with their company. The average employment among the respondents was four years. The sample consisted of 74 percent part-time employees and 25 percent full-time employees. This is a good sample. The industry is just starting to use video tapes as a training medium with the recently hired employees. Because video tapes are a relatively new training medium in the Southern California market, most chains are only using videos to train cashiers and clerks. As a result, our data only includes these two occupational areas. Our data shows that less experienced employees were usually cashiers, with more experienced employees being clerks. In the grocery industry, the titles cashier/clerk are somewhat synonymous, as both perform the same job when instructed to do so.

Viewing Requirements of Respondents

Table 2 clearly shows that video training tapes are a relatively new concept in the grocery industry. Our interpretation of interviews with various training personnel showed that the future thrust is to use videos increasingly more as a training medium. Therefore, the results indicate that companies need to stiffen viewing requirements and use video training tapes at a higher frequency. In relation, Table 3 indicates store restraints are clearly the cause of low viewing percentages. The number one problem is a lack of time made available during working hours for viewing training tapes. Next, is the lack of emphasis on the part of store managers to stress the viewing of training tapes among their employees. Our personal interviews with store managers revealed that most managers were comfortable with the video training equipment concept but stressed the time factor (labor dollars) involved was too great to really push viewing of training tapes by their employees.

Respondents Attitude Toward Video Training Equipment

Employee response to video training equipment usage clearly indicates a desire among employees to improve their job performance through this training medium. Only 10 percent of the employees in the sample felt that training tapes were useless. This presents an interesting correlation between the measurement of productivity before and after viewing. The 10 percent that felt training tapes were useless fell into two categories:

(1) Employees who viewed the training tapes, but did not have their productivity measured before or after viewing.

(2) Employees with over 10 years' experience

The respondents who felt training films were extremely useful were employees who had their productivity measured before and after viewing the video tapes. In the personal interviews with corporate training personnel, this aspect was also pointed out. Vons Grocery Company uses productivity measurements,and "incentives" are in the form of reaching an overall productivity level in scanning, and achieving the designation as a "scanning pro."

This led to an interesting correlation in our research. Companies in the grocery industry that are just beginning to use video training equipment in most cases showed a definite attempt to measure productivity. Whereas, companies that already had sufficient video training equipment and a library of training tapes made little attempt to measure productivity. Also, grocery companies that have video training equipment in their stores provide very little means of explaining how to use the equipment. Companies that are rotating video training equipment from store to store on a weekly basis, are using training personnel to explain how to use the equipment.

TABLE 2

When and How Often Employees are Required to View Videos

Various Viewing Requirements	Percent of Respondents
View training tapes as part of hiring orientation	38%
Requirement within the store	29
Number viewing training tapes more than once a year	45

TABLE 3

Emphasis on Video Training Tapes in the Stores

Store Restraints	Percent of Respondents	
	Yes	No
Is sufficient time available to view videos during work hours?	22%	78%
Feel more time should be made available during work hours	81	19
Does store manager emphasize training films as important	40	60

TABLE 4

Employees' Feelings of Training Tapes and Productivity Measurement

Employee Response	Percent of Respondents		
	None	Somewhat	Extensively
Are training films effective in adding to your knowledge of job tasks	12% (yes)	57% (no)	28% (n/a)
Do you feel your productivity has increased since viewing the videos	26	61	13
Is your productivity measured after viewing the training cassettes	52	6	42
Do you feel training tapes are useless and should be done away with	10	85	5

OVERALL CONCLUSIONS

(1) An overwhelming majority of employees feel video tapes are a useful training medium.

(2) Employees feel the video tape training medium is important enough to allocate work time for viewing.

(3) Productivity measurement is a key aspect in making in-store video tapes an effective training medium.

(4) Increased emphasis by store management is a key to the success of this training concept.

FUTURE OUTLOOK AND RECOMMENDATIONS

Videotape training at store level has a great future. However, in interviewing corporate training personnel from the major chains, we learned that video usage is still in its infant stage. The corporation training personnel strongly expressed the future of training as being rich in video tape usage. Their ideas for future use include:

(1) Expanding video equipment into every store in their chain. (Ralphs Grocery Company has already accomplished this.)

(2) Expanding video tape usage to include major selling times of the year, such as Christmas, Thanksgiving, Easter, Halloween and Independence Day. This could eliminate the need for costly meetings throughout the year.

(3) Actual use of video tapes on the sales floor to educate the consumers. For example: how to prepare a cut of meat or how to select ripe fruit.

(4) Broadcast video tapes from corporate headquarters to actual store locations. Establishing a permanent line of communication to each of the chain's stores.

Our research team thinks these future ideas will greatly benefit the grocery industry. Our major concern is that the present means of implementation needs improvement. If the problems we discovered go unresolved, the future of video tapes as a training medium in-store will be hindered. ■

SAMI UPDATE: HBA Sales Continue to Be Strong

Sales in health and beauty aids continue to be extremely strong as the year picks up steam.

BY ALAN MILLER

The 4.3 percent increase in unit sales during the SAMI reporting period that ended March 2, 1984, represents an increase over both last year's 2.9 percent rise and the 2.7 percent gain in the immediately preceding reporting period.

HBA sales, unlike some food categories, are not noticeably affected by year-to-year difference in the dates of the observances of Lent, Easter and Passover. Nor are the SAMI sales figures inflated by the fact that February had 29 days this year; each SAMI reporting period has 28 days, regardless of the length of the month.

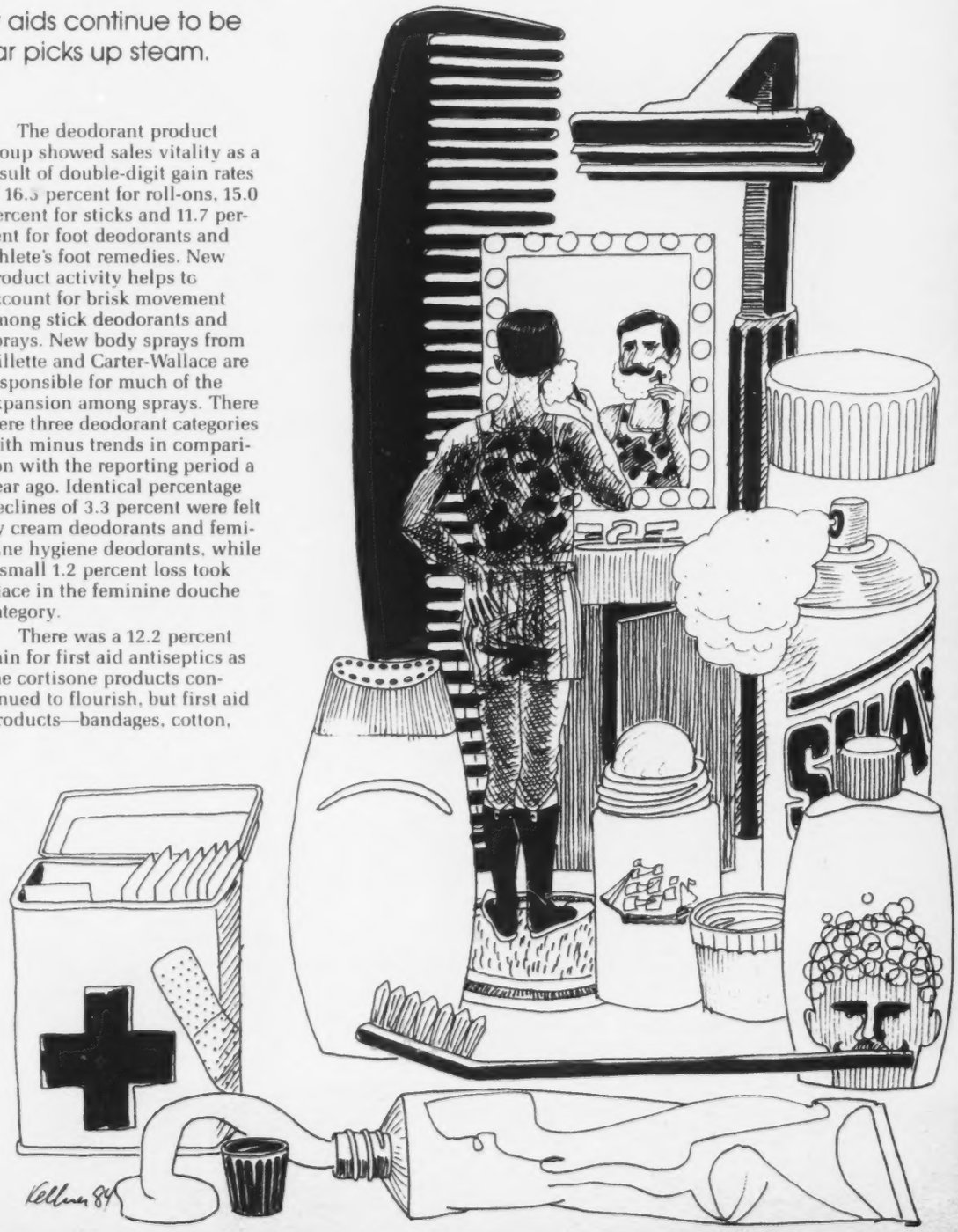
During February, there were sales gains in all eight product groups tracked by SAMI, ranging from a high of 10.4 percent in the case of deodorants to a low of 0.9 percent for first aid. At the category level, gains were found in 37, while losses were registered in 13. The highest gain was an impressive +36.4 percent among hair setting needs, while the sharpest declines were in relatively low volume categories: tranquilizers (−13.8 percent) and infant clothes (−10.8 percent).

Baby needs

In the baby needs product group, infant clothes, as noted, was the only category with a record of loss. Nursing supplies continue to exhibit strong sales performance and registered an 8.2 percent gain in February. More modest rates of increase were observed in baby powders (+1.1 percent) and baby oils, cream and lotions (+1.6 percent). Baby powders have returned to the plus column following several months of loss rates.

The deodorant product group showed sales vitality as a result of double-digit gain rates of 16.5 percent for roll-ons, 15.0 percent for sticks and 11.7 percent for foot deodorants and athlete's foot remedies. New product activity helps to account for brisk movement among stick deodorants and sprays. New body sprays from Gillette and Carter-Wallace are responsible for much of the expansion among sprays. There were three deodorant categories with minus trends in comparison with the reporting period a year ago. Identical percentage declines of 3.3 percent were felt by cream deodorants and feminine hygiene deodorants, while a small 1.2 percent loss took place in the feminine douche category.

There was a 12.2 percent gain for first aid antiseptics as the cortisone products continued to flourish, but first aid products—bandages, cotton,



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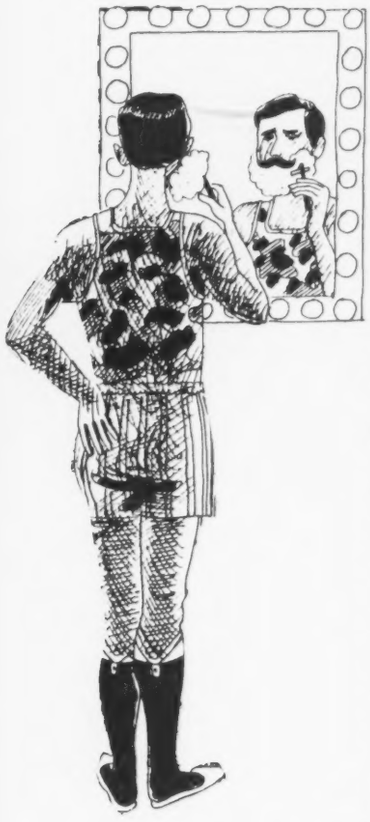

gauze and the like—experienced a decline of 1.6 percent.

All of the seven categories of hair care needs enjoyed increased sales, particularly hair setting needs (+36.4 percent), where new items have expanded the category and hair dressing needs (+14.9 percent), where the new mousse products have begun to proliferate. As usual, new products have contributed to growth in the shampoo category, notably Dimension from Lever Bros., Mink Difference marketed by Gillette, Affinity from Johnson & Johnson and Perma Soft launched by La Maur.

Conditioning

Hair conditioning rinses have returned to the gain column after an absence of several months. Increases were found both among established brands and new entries. Hair sprays had a double-digit rate of growth (+12.5 percent), while smaller gains were found among home permanent kits (+2.3 percent) and hair coloring (+2.4 percent). Four-week sales for total hair care needs rose almost three million units versus the year earlier period.

Among oral hygiene products, toothpastes and powders showed a solid gain of 4.9 percent in contrast with losses during the two previous four-week periods. Mouth washes were ahead 0.8 percent and denture adhesives grew only 0.6 percent. Losses of 1.1 percent and 7.5 percent were found among breath fresheners and denture cleaners respectively. The highest rate of gain in this product group was 8.7 percent in the case of toothbrushes.

SAMI measures 13 different categories of proprietary remedies. In eight of these, there were unit volume increases as high as 25.8 percent for sleeping aids, 14.3 percent for eye care products and 10.0 percent for vitamins, which have enjoyed strong growth for several months. Three of the five proprietary remedy categories with four-week declines were cold remedies: nasal sprays, drops, inhalers (−7.7 percent), chest rubs (−5.9 percent) and cough remedies (−5.3 percent). These same three categories show losses on a 12-week and 52-week basis as well. There was a 5.7 percent gain for appetite suppressants, a category which has just passed the one-year anniversary as a SAMI category.

All five SAMI categories of shaving needs exhibited growth, paced by razors and blades (+18.3 percent). The lowest gain rate in this sector was 4.1 percent for razor blades.

Another strong product group was skin care aids, which grew 7.9 percent in all five categories combined. The only loss was 7.7 percent for suntan lotion and suntan oil which translates to only a small number of dollars lost during the winter season.

Lip care products blossomed to the tune of +17.0 percent and hand & body creams and lotions enjoyed the third period in a row of double-digit sales gain performance. These increases have been achieved without the benefit of substantial volume from important new products.

As a result of continuing and consistent growth, health and beauty aids are increasing their share of total food store sales. ■

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO		
	4 WEEKS ENDING 1/14/84	4 WEEKS ENDING 2/3/84	4 WEEKS ENDING 3/2/84
BABY NEEDS	+ 5.1%	+ 2.2%	+ 2.1
Baby Powders	− 2.6	− 6.7	+ 1.1
Baby Oil, Creams & Lotions	+11.8	+ 7.3	+ 1.6
Infant Clothes	− 10.1	− 10.1	− 10.8
Nursing Supplies	+ 7.3	+ 5.5	+ 6.2
DEODORANTS	+ 2.9%	+ 6.9%	+10.4%
Soaps	− 4.3	+ 2.5	+ 8.3
Roll-On	+ 3.0	+10.2	+16.3
Stick Deodorants & Pads	+ 9.5	+13.3	+15.0
Creams	− 5.0	− 4.2	− 3.3
Deodorants & Talcum Powders	+ 1.2	− 2.2	+ 0.9
Feminine Hygiene Deodorants	− 14.5	− 16.1	− 3.3
Foot Deodorants & Athlete's Foot Remedies	+ 9.0	+ 6.6	+11.7
Feminine Douches	+ 0.0	+ 4.9	− 1.2
FIRST AID	+ 0.4%	+ 2.2%	+ 8.9%
Antiseptics	+12.0	+ 4.2	+12.2
First Aid Products	− 2.0	+ 1.8	− 1.6
HAIR CARE NEEDS	− 2.5%	+ 2.2%	− 4.8%
Shampoos	− 1.7	+ 4.0	+ 5.3
Hair Sprays	+ 0.1	+ 2.3	+12.5
Hair Conditioning Rinses	− 9.5	− 3.6	+ 3.9
Hair Setting Needs	+28.9	+43.6	+36.4
Home Permanent Kits	− 2.9	+ 1.3	+ 2.3
Hair Coloring	− 1.1	− 4.1	+ 2.4
Hair Dressing Needs	+ 3.7	+ 7.2	+14.9
ORAL HYGIENE	− 1.8%	− 6.7%	+ 3.8%
Toothpastes & Powders	− 6.5	− 2.0	+ 4.9
Mouthwashes	+ 7.2	+ 2.6	+ 0.8
Breath Fresheners	+14.7	+11.2	− 1.1
Denture Cleaners	− 6.4	− 8.3	− 7.5
Denture Adhesives	+ 2.6	+ 1.3	+ 0.6
Toothbrushes	− 10.3	+ 1.8	+ 8.7
PROPRIETARY REMEDIES	− 4.8%	− 2.0%	+ 5.1%
Antacids	− 1.4	+ 1.3	− 1.3
Internal Analgesics	+ 3.0	+ 4.4	+ 4.1
External Analgesics	− 1.4	+ 8.7	+ 2.4
Cold Tablets	+16.0	+11.7	+ 4.4
Nasal Sprays—Drops—Inhalers	+ 8.1	− 4.0	− 7.7
Chest Rubs	+ 5.3	− 4.8	− 5.9
Cough Remedies	− 2.7	− 6.6	− 5.3
Eye Care	− 2.6	− 0.3	− 0.7
Sleeping Aids	+ 2.1	+ 9.4	+25.8
Vitamins	+ 8.4	+ 2.3	− 13.8
Ear Care Products	− 0.2	+ 8.1	+10.0
Foot Care Products	− 1.6	+ 4.6	+ 1.4
Appetite Suppressants		+ 4.4	+ 5.7
SHAVING NEEDS	+ 4.1%	+ 4.8%	+ 4.8%
Shaving Creams	+ 1.1	+ 2.1	+ 1.8
Razor Blades	+ 4.1	+ 5.0	+ 4.9
Razors	+ 6.3	+ 6.2	+ 6.1
After Shaves	+ 2.5	+ 3.1	+ 4.1
Pre-Shave Lotions	− 0.8	+ 0.4	− 0.8
SUN CARE AIDS	− 12.8	− 7.7	− 7.7
Suntan Lotion & Suntan Oil	− 9.5	− 7.1	− 7.7
Sunscreens	− 2.1	+ 0.4	+11.5
After Sun Lotions	− 2.5	− 1.3	− 4.5
Insect Repellents	− 1.1	+ 1.3	+ 1.0
LIP CARE AIDS	+ 3.1%	+ 5.1%	+17.0
Lip Balms	+ 3.1	+ 5.1	+17.0
HAND & BODY CREAMS & LOTIONS	+ 3.1%	+ 5.1%	+17.0
Hand & Body Creams & Lotions	+ 3.1	+ 5.1	+17.0

Looking at Nutritional Facts About Meat

There's been a lot of information in the mass media lately about diet, health and nutrition. Some of these news items have implicated meat—but others take the opposite view.

Consider this quote from a widely syndicated newspaper column, "On Nutrition," written by Dr. Jean Mayer and Jeanne Goldberg R.D.:

"Many people today have unrealistic notions about what nutrition can accomplish. To hear the claims of certain enthusiasts, nutritional treatments can reverse the aging process, provide superhuman energy, guarantee against illness and cure a number of chronic diseases, including cancer." The columnists also stated that although nutrition certainly has an important role to play in preventive medicine, it has been unquestionably oversold. Mayer and Goldberg speculate that one of the reasons nutrition has been oversold is because it is a young science, which makes it vulnerable to misinterpretation.

The plain and simple fact is that contradictory information about diet and nutrition abounds within the consumer marketplace. There may already have come a time when meat department personnel, or even management has questioned the wisdom of promoting the sale of products that have been associated with heart disease and cancer. And if meat departments are in the business of helping supermarkets make a profit, how is the meat, diet and health controversy affecting the profitability of the meat department?

First, we need to address some of the recent health issues involving meat products, levels of consumption and meat's contribution to the American diet.

For years, meat *production* figures have been mistakenly interpreted as meat *consumption* figures—as either a carcass or retail weight figure. For purposes of tracking trends, these are reliable and easily calculated figures. But for a reflection of the dietary contributions of meat, a conversion to cooked, edible portions must be made, accounting for bone removal, cooking losses and fat trimmed before consumption.

Consider beef, for example. In 1982, the per capita consumption on a *carcass weight* basis was 104.4 pounds, or 77.3 pounds on a *retail weight* basis. But fewer pounds are actually consumed. In fact, when the bones are removed, the beef is cooked and half of the fat is trimmed (from retail trim), the figure drops to about 58 pounds, 11 of which are in the processed form and 47 of which represent beef cooked from the fresh state.

The average American did not eat 139.4 pounds of red meat in 1982, but he did eat 91.1 pounds, on an "as consumed" basis. That's 3.99 ounces of all red meats per person per day. (Keep in mind the dietary recommendation that we consume two 2-3 ounce servings from the meat group.

According to Table 1, the argument that meat consumption is too high doesn't hold water—especially when you consider that there's no such thing as an "average consumer."

Recognizing that the frequency of use varies, a 1983 study, "Consumer Climate for Meat Products," conducted by Yankelovich, Skelly and White, was commissioned to determine what types of consumers eat various red meat products—and how often. For the ground beef, fresh beef other than ground, fresh pork and processed meats—frequency of use segments were identified. They divide the households into heavy users (four times or more during a two-week period), moderate/light users (serving beef one to three times during a two-week period) and occasional users. In order to represent the entire user population, it was estimated that occasional users consume beef at a level one-sixth that of the moderate/light user group. Table 2 expresses daily consumption among product categories.

With a clearer understanding of actual consumption, the contribution of red meat to the U.S. diet can be calculated by using recently completed studies by the U.S. Department of Agriculture profiling the new nutrient composition of beef, pork and lamb. Table 3 provides the specific contribution for average and heavy red meat users.

Cholesterol. The recently released Coronary Primary Prevention Trial provides valuable information about the correlation between serum cholesterol (i.e., cholesterol in human blood) and heart disease. However, it was a drug intervention trial, not a diet study, and provided no information whatsoever about the alleged relationship between *dietary* cholesterol and *serum* cholesterol.

It's often overlooked that cholesterol is an *essential* part of our body chemistry. The body can manufacture from 800 to 1500 mg of it daily even if no cholesterol is consumed in the diet. Furthermore, the body absorbs only about 15 percent of dietary cholesterol.

Even so, consider the American Heart Association's recom-

Continued on page 101

By John Francis, National Livestock and Meat Board

TABLE 1.

Red Meat "Eaten" Per Capita for 1982
in pounds

	Carcass Wt.	Retail Wt.		Edible Portion Wt.	
		Fresh	Processed	Total	
Beef	104.4	77.3	47.22	11.05	58.27
Pork	62.7	59.0	7.61	22.88	30.49
Veal and Lamb	3.7	3.1	2.05	.29	2.34
Total	170.8	139.4	56.88	34.22	91.10

TABLE 2.

How Much Meat Do We Eat?
(all figures are ounces eaten per day)

	Fresh Beef					
Consumer Segments	Other Than Ground Beef	Ground Beef	Fresh Pork	Veal	Lamb	Processed Meat
Occasional Users.	.073	.165	.061	NA*	NA*	NA
Moderate/Light Users	.436	.986	.364	NA	NA	.972
Heavy Users	1.216	2.986	1.110	NA	NA	3.356
Total Meat Users	.677	1.466	.405	NA	NA	1.653
Avg. for U.S. Population	.650	1.422	.345	.040	.034	1.504

*Figures not available because 1983 report by Yankelovich, Skelly and White did not include veal or lamb usage categories.

TABLE 3.

Heavy Users, Average Users: What Does Meat Contribute?

	Heavy Users		Average Population	
	Units	% of RDA*	Units	% of RDA*
TOTAL MEAT—oz.	8.74	NA	3.99	NA
Protein—g	55.7	99.5	25.5	45.5
Lipids—g	52.3	NA	23.7	NA
Kcal	718 NA	327	NA	
Cholesterol—mg	191 NA	87	NA	
Iron—mg	5.255	52.6	2.476	24.8
Zinc—mg	10.129	67.5	4.771	26.5
Sodium—mg	1215 NA	546	NA	
Thiamin—mg	.718	51.3	.298	21.3
Riboflavin—mg	.577	36.1	.258	16.1
Niacin—mg	9.529	52.9	4.277	23.8
Vitamin B-12—mcg	4.488	149.6	2.130	71.0

*Percent of Recommended Dietary Allowances for adult male aged 23-50.

PRODUCE

Continued from page 86

Again this year, the Papaya Administrative Committee will support the sale of their products with a program of consumer public relations, in-store demonstrations and point-of-purchase distribution. Two new items included in this year's promotion program are backroom ripening charts for the trade and a consumer version for display purposes in the produce department.

Kiwifruit: The summer kiwifruit volume comes from New Zealand, and again this year approximately 1.5 million trays of kiwis (the same as last year) will be shipped to Northern California from New Zealand.

The New Zealand Kiwifruit Commission will support the effort with a massive merchandising program including point-of-sale kits, in-store demos, and other support activities. Kiwi continues to make headlines in magazines and newspaper food pages, and the industry is capitalizing on this with an aggressive public relations program.

Mangos: Mangos are one of the fastest-growing fruit items in the United States, with Mexico supplying better than 80 percent of the total production and approximately 10 percent coming from Florida and 10 percent from the Caribbean.

Approximately 70 million pounds will be distributed from the sources, during June, July and August.

Limes: Florida continues to be the dominant factor in supplying the U.S. market with limes, although Mexico is once again shipping to the United States. Present estimates are that approximately two-thirds of the total lime volume will come from Florida and one-third from Mexico. (California produces a modest volume as well.) During the summer period, approximately 50 million pounds of limes will be sold throughout the United States.

Altogether more than $25 million will be invested by growers and distributors of summer fruit to make this year the biggest volume year ever. It should be a record year for supermarket cash registers as well as fruit growers and shippers! ■

MEAT

Continued from page 92

mendation that daily dietary cholesterol intake be limited to 300 mg for the general population. A serving of beef contains 73 mg cholesterol, while pork stands at 79 mg and lamb at 78 mg per serving. The average contribution of cholesterol from red meat, then, averages only 87 mg a day, or 29 percent of the American Heart Association's recommendations.

Fat. Many health professionals suggest that Americans limit their fat intake to 30 percent of calories. An adult male has a 2700 daily calorie budget. The average user consumes 23.7 grams of fat a day from meat (less than one ounce), or 214 calories, which is about eight percent of the daily calorie budget. Even the heavy user is under the 30 percent mark (27 percent).

What about saturated fats? Isn't meat fat all saturated? No, the nutrient composition studies by the USDA have determined that only 48 percent of the fat in beef is saturated, pork fat is only 36 percent saturated and lamb fat is 56 percent saturated.

Sodium. For those concerned about dietary sodium, fresh meats generally range in the 60 to 80 mg level per three ounce serving. Sodium is also a functional ingredient in processed meat products. All totaled, our average daily consumption of sodium from all red meats, processed included, is about 550 mg. Over 90 percent of the sodium consumed from meat is from processed meats. The Food and Nutrition Board of the National Research Council suggests a range of 1100-3300 mg sodium consumed per day as a level considered "safe and adequate."

Nutrition information can be a key factor in any meat department merchandising program. Our present level of meat consumption fits well into dietary recommendations for consuming two 2-3 ounce servings from the meat group daily. But knowing that nearly two-thirds of all consumers are eating less than four ounces of red meat per day suggests excellent opportunities for expanding meat sales through target marketing. ■

For further information, write me at The Meat Board, 444 N. Michigan Avenue, Chicago IL 60611.

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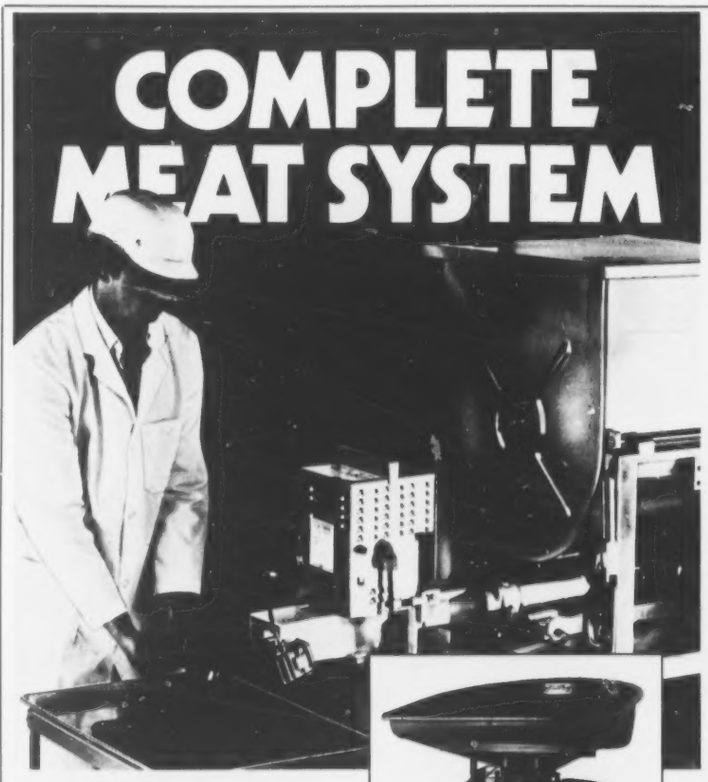

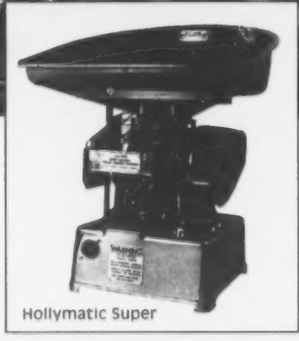
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